As an office worker, you need to use effectively the resources that support your work activities. These resources include time, reference sources, office supplies and equipment, and paper and electronic records. You need to take part in meetings with coworkers and make travel arrangements for yourself and others. You also need to be aware of the critical concerns for office health, safety, and security that affect all office workers. You will build skills in these important areas as you study Managing Time, Tasks, and Records.
CHAPTER 7

Time and Workstation Management

How you manage your actions in relation to time is important. The term time management refers to this process. Managing the resources used in your work is as important as managing your time wisely. Arranging furniture and equipment in your work area properly can increase your productivity. It can also make your workplace safer.

In this chapter, you will learn to use your time in a productive way. You will learn about safety and security concerns that affect office workers. You also will learn about how factors such as lighting, office equipment, and furniture affect how you feel in the office environment.

Online Resources

- The Office Web site:
  Data Files
  Vocabulary Flashcards
  Beat the Clock, Ergonomics
  Chapter 7 Supplementary Activity
- Human Factors and Ergonomics Society
  P.O. Box 1369
  Santa Monica, CA 90406-1369
- Search terms:
  time management
  work simplification
  personal digital assistant (PDA)
  ergonomics
  office health and safety
  workplace violence

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Time management is a major factor in your productivity and effectiveness as an office worker. Managing your time at the office is a process of choosing the most effective way to do your job. The creative use of techniques to manage time will enrich your work life.

Calendar and reminder systems are helpful in bringing to mind events and tasks to be completed. These reminder systems help you schedule activities for the most efficient use of time and resources.

**Manage Your Time**

Time management is the process of planning your activities to gain better control over how you spend your time. Managing your time effectively is critical to your success on the job. You will want to learn how to eliminate time-wasters and handle tasks efficiently. Analyzing how you spend your time will increase your effectiveness in managing your work. One of the first steps in learning how to use your time is to recognize how it can be wasted.

**Common Time-Wasters**

Not all time spent at work is productive. You can waste time without realizing it. Some common time-wasters, along with suggestions for overcoming them, are discussed in the following paragraphs.

**Unnecessary Telephone Conversations**

The telephone can be either a time-saver or a time-waster, depending on how you use it. Often, a telephone call that could save time wastes time instead. For example, suppose an office worker takes ten minutes to verify price information by telephone. In the same call, the worker takes five minutes to discuss the latest episode of a favorite television program. A conversation that began productively ends by wasting time. If this happens two or three times a day, the time wasted can add up rapidly.

**Frequent Interruptions**

An interruption is a person, sound, or event that stops you from completing work. Interruptions to your work can come from many sources. Unplanned visits or questions from coworkers or customers, phone calls, and delays in receiving work or material from others are common ones. On the surface, each of these events may appear to be a time-waster. Remember, however, that working with coworkers and customers is an important part of most jobs. Questions from coworkers and customers that relate to your work are not time-wasters.
Excessive Socializing

Some socializing will help you keep good working relations with your coworkers. Too much socializing, however, is misuse of company time. Some workers may socialize excessively. You will be wise to avoid engaging in long conversations with them. When a coworker tries to involve you in idle conversation, offer a simple response such as: “I really must get back to work. Maybe we could discuss this at lunch.” You will maintain good working relations while excusing yourself to continue your work. If you are consistent in your responses, the coworker will soon learn that you are not easily distracted from your work. Be careful to limit your lunch and breaks to the planned or approved times.

Ineffective Communication

As an office worker, you will receive information in both written and oral form from customers and coworkers. You also will give information in written and oral form to others. If the information that is given or received by you is inaccurate or incomplete, lost time and money can be the result of the poor communication. Be certain the information you give others is specific and accurate. Ask for feedback from those to whom you give information to be sure your message is clear and complete. Likewise, be sure that you understand any instructions or information you receive. Ask questions to verify data and to gain all the needed information.

Disorganization

Being disorganized can be a major time-waster. Searching for the paper you just had in your hands, forgetting important deadlines, and shifting unnecessarily from one project to another are all signs of a disorganized person. Take the time to organize your work area and prepare a daily plan for your work. Think through and plan complicated jobs before starting them. Group similar tasks together. Avoid jumping from one project to another before finishing the first one. Do not procrastinate. If unpleasant or difficult tasks are needlessly delayed, they can become problems later.
Time Analysis Procedures

Time is a valuable resource that should be used wisely; it cannot be replaced. You have learned about common ways time can be wasted. One of the smartest things you can do is to analyze how you spend your time on the job. Time analysis aids you in determining how effectively your time is used. By keeping a written account of what you do, you can determine whether you are using your time effectively. With this information, you can then develop a plan of action to correct or redirect the use of your time.

Keep a Time Log

Start a time analysis by keeping a written record of what you do and how much time is used. Record all activities in a time-use log. Note tasks accepted and completed. Record telephone calls, meetings, discussions, receiving and responding to e-mail messages or other correspondence, and so forth.

You may choose to keep a time-use log for a day, for several days, or even a week. The longer you keep the log, the more representative it will be of how your time is spent. A partial time-use log is shown in Figure 7-1.1.

Analyze How You Spend Your Time

When you have completed your time-use log, you are ready to analyze the results. By studying your time-use patterns, you will be able to spot problem areas quickly. Be alert to the following points as you review the log:

- During what time of the day was I most productive? Least productive? Why?
- How did I lose (or waste) my time? Was it because of unnecessary interruptions, visitors/socializing, crises, telephone? Who and what was involved in each case?
- Does a pattern emerge that might show the times when most interruptions occur? Does a pattern indicate that more time is needed to handle crises or emergency tasks that may arise? Do I need more time to complete specific tasks?
- Do I think that I have used my time wisely?

Develop a Plan of Action

After you have analyzed how you spend your time, determine how well the tasks you complete contribute to meeting your work goals. Look at each activity you have listed in your time-use log. Ask yourself whether that activity helped you complete your work. If not, develop a different approach to your work that will increase the effective use of your time.

Manage Your Work

Using time efficiently requires developing an organized approach to your work. Calendars and time-management systems can help you identify busy and slow work periods. Once you know when to expect such periods, you can plan your work to allow for more productive use of your time and for a more even workload. To accommodate a busy or peak period, think ahead
to determine what jobs could be completed in advance. Then the peak
period will not place undue pressure on you. Planning for the slow periods
is equally important. During these times, you can catch up on those tasks
that do not have deadlines but nevertheless must be done.

**Plan Your Work Activities**

Planning your daily work activities will help you avoid forgetting tasks that
need to be completed. Take five or ten minutes either at the beginning or
the close of the workday to plan the coming day’s work. Prepare a task list
or update an ongoing list and complete the tasks according to their order of
importance or to meet deadlines. Keep the list at hand as you work. Check
it frequently. This list should guide you through your daily activities. When
a task is completed, indicate this on the list. Tasks not completed can be
carried over to the next day’s list. Be alert, however, to any item that seems
to be carried over too many times. Perhaps it should be broken down into
smaller segments. Perhaps you are procrastinating in completing the task.

*Figure 7-1.1*

A time-use log will aid in determining how effectively your time is used.
Your task list can be a simple handwritten or keyed list. If you have the software available, your list may be created using a calendar program or personal information management software. These programs allow you to manage appointments and schedule tasks as well as other functions.

Figure 7-1.2
This task list details work or meetings for the day.

Set Priorities

Once you have identified tasks for the day, rank them on your task list and complete the most important ones first. To determine the priority of the tasks, ask yourself these questions:

- How much time will the task require?
- By what date (time) should the task be completed?
- Are others involved in completing the task?
- What will happen if this task is not completed on time?
- Do I have all of the information (or materials) I need to complete the task?

At times you may need to discuss your priorities with coworkers or a supervisor. You need to be certain that you agree on the order for doing tasks. Once you set your priorities, finish the tasks in their priority order. Remain flexible, however, about revising your priorities as circumstances change.

Ana Maria’s task list for tomorrow is shown in Figure 7-1.2. Notice that she has identified the tasks as Category A, B, or C. The A-level tasks need immediate attention or completion. B-level tasks can be done once the A-level tasks have been completed. C-level tasks have no specific deadline but can be done when the A and B tasks have been completed. If the item is a long-term project, the portion of the task that should be finished that day is listed.
Control Large Projects

Sometimes, getting started on a large project is difficult even though it may be very important. Smaller tasks can be checked off your task list with ease; a large task may seem overwhelming. Do not let the size of a project keep you from getting organized and moving toward completion of the task. Follow these suggestions for handling a large project:

- Break the large project into smaller tasks.
- Determine the steps to be taken in each of the smaller tasks.
- Establish deadlines for each section or smaller task and meet those deadlines.
- Look for ways to improve your procedures and simplify the completion of the project.
- If the large project is one that will be repeated periodically, record your procedures for later use. Note suggestions you want to follow in the future for improvements.

Simplify Your Work

Work simplification is the process of improving the procedures for getting work done. The process often involves simplifying some steps and eliminating others. Your goal is to use the most efficient procedure for completing a task. As you complete a task, be aware of the steps you are completing. Eliminate any unnecessary steps and/or details. Consider alternative methods for completing the task. Are those methods more efficient than those you are using? Look at the task and your procedures objectively to find ways to improve your productivity.
Analyze the Workflow

Consider the information and work assignments you receive and those you forward to others. Ask yourself these questions:

- Does the flow of work to my desk make good use of my time and effort? Of everyone’s time and effort?
- Does the flow of work provide the right information to customers or others outside the company in a timely fashion?
- Are the materials and equipment needed to complete my work readily at hand or nearby?
- Am I using the features of my office equipment and software to their fullest extent?

Your answers to these questions should provide clues to simplifying your work. Incorporate these suggestions into your workflow analysis:

- Group and complete similar tasks together. For example, if you need photocopies of the letters you are preparing, make them all at once rather than making several trips to the copier. If you have several related phone calls to make, try to make them in sequence.
- Combine tasks if doing so will increase your efficiency. For example, suppose you plan to leave a request at the records center for a series of files you need to complete a report. If the records center is near the company cafeteria, stop by the records center on your way to lunch.
- Determine how to best organize and arrange the equipment and supplies you use to complete a task. For example, do you cross a room every few minutes to retrieve pages from a printer? If yes, perhaps you can change the placement of the equipment to provide a smoother flow of work.
- Enlist the help of others when you have an important deadline to meet and the workload is overwhelming. Be sure to help other workers when the roles are reversed.

Handle Information Overload

When the amount of information you receive on a daily basis becomes overwhelming, you are experiencing information overload. You need to provide and receive information in a timely manner. You will save time (yours and others’) by trying to handle each message, file, or paper just once. Take any needed action immediately if that is appropriate. Otherwise, add the task to your task list for completion at the proper time. In this way, the amount of information you receive will not become overwhelming. A good rule of thumb is to make a decision about how to handle every message, piece of paper, or file the first time you view it.

Reminder Systems

As an office worker, you must keep track of appointments, meetings, travel dates, and deadlines. Perhaps the most widely used device for keeping track of such items is a calendar. A reminder file, arranged chronologically, also can be helpful. This file can provide a convenient place to keep notes about tasks to be performed on specific dates.
**Manual Systems**

A well-maintained desk calendar can assist you in keeping track of the many tasks and deadlines in your job. It can also be helpful to others who may have access to it. It can be used to record appointments, deadlines, meetings, or other important data.

Personal planners, also called day planners or organizers, are popular with many people. These small notebooks contain a calendar and space for recording appointments. Task lists, notes, and contacts can also be recorded. Many businesspeople find these manual aids very helpful in organizing tasks and schedules.

Wall calendars also are useful when large projects or those involving a number of people are broken into various small tasks with many deadlines. By displaying the wall calendar, you and others can keep track of deadlines.

**Electronic Systems**

Calendar and personal information management (PIM) programs have various features. They can be used to keep track of project deadlines, appointments, and work schedules. These programs often include task lists. For each task, related notes, deadlines, and completion dates can be entered. Some programs sound an alarm to remind users of specific tasks or deadlines. PIM programs usually include an address book where you can record contact information for coworkers, clients, and other people or companies. Programs that include more advanced features for planning large or long-term projects are sometimes called scheduling or **project management programs**.

**WORKPLACE CONNECTIONS**

Donna uses a program to track her weekly schedule. The calendar shows an 8:30 a.m. staff meeting that the supervisor has scheduled for Monday. Several other appointments are listed as well. She can print the information, make a note regarding the meeting, or forward the message electronically to a coworker as a reminder.

**Manual time management systems can help you plan and organize tasks.**
A personal digital assistant (PDA) is a handheld computer. Programs can be loaded onto a PDA to do a variety of tasks. PDAs usually come with programs for storing contact data, scheduling appointments, and creating task lists. Figure 7-1.3 shows a screen from a PDA calendar program where the user can record data related to a meeting. Other typical tasks a user can do with a PDA include:

- Use handwritten input
- Access and send e-mail messages
- Work with programs such as word processors or spreadsheets
- Do calculations such as currency conversions
- Upload data to or download data from desktop or laptop computers
- Record notes of telephone calls
- Recognize schedule conflicts
- Sound alarms as reminders of meetings or deadlines
- Search the Internet

Some PDAs can share data with calendar or PIM programs on a desktop computer. This sharing of data allows the user to coordinate schedules easily.

**Figure 7-1.3**

Personal digital assistants provide a variety of calendar features.

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**Scheduling Appointments**

Typically, you will have your own calendar to maintain. You also may make appointments and schedule meetings for coworkers. People request appointments in different ways. The request may be made in person, by telephone, by letter or memo, or by e-mail. Although the manner in which you respond to these requests may vary, the basic information you need will be the same:

- **Who:** Name, e-mail address, and telephone number of the individual requesting the appointment
- **When:** Date, time, and approximate length of appointment
- **Where:** Location of the appointment
- **Why:** Purpose of the meeting
Responding to Appointment Requests

When you receive a request for an appointment, check the calendar to determine whether the date and time requested are available. If not, you may suggest other appointment dates and times. By knowing the purpose of the meeting, you can determine and provide all supporting materials needed. To maintain a calendar properly, clarify the following points:

- To what extent do you have authority to make appointments for others?
- When should you check with others before making appointments?
- At what regular times are appointments not to be made, such as the first half-hour of the day?
- To what extent will the manager or coworkers make appointments without checking with you?
- Does the person for whom the appointment is made want to know the purpose of each appointment you schedule?

The authority you have to make appointments will depend in great part on the nature of your job. For example, if you work in a doctor’s office, most of the appointment requests would be from patients. You would be expected to schedule appointments without having to verify each one with the doctor. On the other hand, you may work in a general office where both you and your coworkers make appointments. You must agree on procedures that will allow you to operate effectively. Follow these guidelines when making appointments:

- Do not schedule overlapping appointments. Try to determine the amount of time needed for each one. Leave some time unscheduled between appointments to allow for meetings that run longer than planned, to return telephone calls, or to prepare for the next appointment.
- Keep a complete calendar. Record names, telephone numbers, e-mail addresses, and other related information.
- Use clear handwriting to record entries on handwritten calendars. Avoid crossing out and rescheduling over scratched-off entries. To make changes easily, write appointment information in pencil.
- If you make appointments for a manager or coworker, you may need to set a time for the appointment and then confirm that time with the individual. Use some symbol to indicate confirmed appointments. As appointments are confirmed, record the symbol. Commonly used symbols include a check mark, an asterisk, or an underscore of the individual’s name.
- If you are responsible for keeping a calendar for others, provide a daily listing of appointments and reminders at the beginning of the workday. Show the appointments for the day in chronological order.
- Keep the previous year’s appointment data. You may find it necessary to refer back to the data to find needed information. If you use an electronic calendar, print a copy of the calendar before deleting the data, or save the information in an electronic file.
Entering Recurring Items

Some meetings and tasks are performed weekly, monthly, quarterly, or annually. As you set up your calendar at the beginning of the year, enter the recurring meetings and tasks. Figure 7-1.4 shows the screen for indicating a recurring meeting using Microsoft® Outlook®. If you block out the times for recurring events, both you and others will know what time is available for scheduling other appointments.

Coordinating Calendars

If both you and your coworkers schedule appointments using desk calendars, you need to coordinate appointments. Changes to schedules are usually made at the beginning or the end of the workday. Tentative appointments should be confirmed. Canceled appointments should be deleted. Materials needed for the appointments should be gathered or prepared.

You may use a calendar program for your individual schedule or to set up group activities. An electronic calendar that is on a computer network often can be updated by everyone using the calendar. Changes made are shown instantly and may be viewed by anyone using the calendar.
Store or record in a tickler file items requiring future action. Assume your employer says to you, “Please call the Morgan Company on Monday. Make an appointment for us to discuss our purchasing contract with them.” You would prepare a reminder to make the phone call and record it under next Monday’s date.

As soon as you become aware of a deadline or a detail that needs to be checked in the future, place a note in your tickler file or program under the relevant day. Check the file each morning and note those items that require attention for the current day. Complete the appropriate action for each item. Using this procedure will help your work flow smoothly.

**Tickler Files**

A tickler file contains notes or records arranged by date for keeping track of future actions. A paper-based tickler file is often divided into 12 monthly sections with 31 daily parts for each day of the month. Tickler files can be set up using index cards or file folders.

Reminders similar to those used in a paper tickler file also can be recorded on a computer using a PIM or database program. You enter data into the program related to a task for a particular date. With PIM software, you can set a reminder for that task to appear on your screen. A reminder for a task entered using Microsoft Outlook is shown in Figure 7-1.5. With database software, you would sort the records by date.

![Reminder](image)

*Figure 7-1.5*  
Reminders help ensure that tasks are completed on time.

Donna needs to schedule a meeting with six other people. She can access a program on the company’s computer network to check the schedules of the six people for times available for the meeting. She can either check all of the schedules herself or she can enter the names of the people she wants to attend the meeting and a general time frame. The program then will look at everyone’s schedule and find a meeting time. Depending on the program available to her, she also might be able to schedule a meeting room.
1. Define time management. Why is time management important to office workers?

2. Identify and describe common time-wasters in the office.

3. Describe the procedures for using your time effectively.

4. Define workflow analysis. What steps can you take to complete an analysis of your workflow?

5. What are reminder systems?

6. What steps can you complete to analyze how you spend your time?

7. What is a personal digital assistant? Name some programs or features commonly found on PDAs that relate to time management.

8. What does work simplification involve?

9. What guidelines should you follow in scheduling appointments?

10. To maintain calendars effectively and efficiently, what points should be discussed with your coworkers?

11. What is the purpose of a tickler file? What types of software can be used to enter reminders electronically?

Ana Maria arrived at the office a few minutes early to review the items on her task list for the day. Just as she was about to begin, her supervisor Ms. Baldwin arrived and told Ana Maria she had received a call at home last night. The national sales meeting scheduled for three weeks from today had been moved to one week from today because of an emergency. Ana Maria said to Ms. Baldwin: “This definitely changes the priorities for today.” The items that Ana Maria had on her task list for today are shown below. She had not prioritized them:

• Revise sales contract for national sales meeting in three weeks
• Complete weekly sales report due in three days
• Start planning monthly sales meeting two weeks from today
• Call Tom about the Patterson report for the monthly sales meeting
• Call Lisa for lunch
• Look in tickler file
• Check e-mail messages
• Schedule room for monthly sales meeting in two weeks
• Make airline and hotel reservations for national sales meeting
• Verify travel expense vouchers
• Replenish desk supplies
1. Think about the changes Ana Maria needs to make in her task list. List the items that will be affected by the supervisor’s news. Will other items be added to her task list? If yes, list them.

2. Prioritize the items to reflect the change in the date and time of the national sales meeting. Key a revised task list.

**REINFORCING ENGLISH SKILLS**

You work in the Human Resources Department of Raleigh Corporation, which makes modular business furniture. Your supervisor, Florita Morales, has prepared a punctuation test to be administered to job applicants. She asks you to complete the punctuation test to be sure that the instructions are clear before she has large quantities of the test printed.

1. Open the *Word* file *CH07 English* from the data files.
2. Follow the instructions to complete the test.

**Topic 7-1**

**ACTIVITY 1**

**Analyzing a Time Log**

As you have learned in this topic, managing your time and developing an orderly approach to your work are important for your success on the job. In this activity, you will complete a daily time log. After you have charted your activities, you will use your chart to help you determine your most and least productive time periods.

1. Prepare a time-use log similar to the one shown in Figure 7-1.1 on page 271 using spreadsheet software. Use 15-minute time intervals. Prepare the chart to cover your entire waking day (for example, 6:30 a.m. until 11:00 p.m.) for one week. Print seven copies of the log, one for each day.

2. Complete your time-use log. Record your activities every 15 minutes as you progress through each day and evening. Record all your activities: studying, attending class or going to work, watching TV, talking on the telephone, eating, and so on.

3. Enter the data from your handwritten logs into your spreadsheet. Summarize your time spent by hours into categories; for example, school, work, leisure, sleep, hobbies, and so on. Use an *Other* category to group activities that occurred only once or twice for very short periods. Create a pie chart showing the percentages of time spent in each different category as part of your total time.
4. Analyze your time log. Identify the hours where you used your time most productively as well as those hours where you wasted your time. During what hours do you get the most accomplished? During what hours do you tend to waste your time?

5. Write a short report titled TIME USE ANALYSIS discussing your time-use log. Include the pie chart in your report. Format the report in unbound report style. Describe what you intend to do differently as a result of your time analysis.

As an office worker, you will need to prioritize work to fulfill duties and meet deadlines. Office work often involves planning and completing long-term projects. In this activity, you will plan, schedule, and complete a long-term project: a portfolio to display your work.

The general purpose of a portfolio is to demonstrate your skills and abilities related to work. A portfolio can contain samples of your work, awards or other recognitions, certificates or degrees related to training or education, a description of assignments or projects that have been successfully completed, and letters or recommendations related to your work abilities. A good portfolio can be helpful in getting a job.

1. This project should be completed four to six weeks from now. You and your instructor should agree on the specific timeline for this activity. Consult with your instructor to determine the deadline for completing the project.

2. List the steps to complete the portfolio. For example, define clearly the purpose for your portfolio, research portfolio layouts, schedule time to work on the portfolio, collect materials (classroom and other), and plan initial documents to go into the portfolio.

3. List the materials and resources you will need to complete the portfolio, such as folders, time, money, paper, dividers, notebooks, classroom projects, and so forth.

4. List the people you need to contact to complete the project: instructors, administrators, students, parents, businesspeople, etc.

5. Create a long-range schedule. Use spreadsheet software to list the dates and tasks to be completed by specific dates. (Hint: Key your ending date or deadline first.) Key a title and beginning date on your schedule to make it uniquely yours. Print a copy of your schedule to use as you complete your portfolio project.
6. Follow your plan to prepare the portfolio. Make a note of the changes that have to be made to your original schedule as you complete your project. Were your deadlines realistic? Were the people available at the times you listed? Did you find the materials and resources available when you needed them? Did you follow your schedule? If no, why not?

7. Write a short report in unbound style summarizing your experiences as you created the portfolio. Discuss the factors listed above and your own observations. Include in your summary a copy of your beginning and ending schedule for comparison purposes.

8. Display or share your portfolio with other class members. Update your portfolio periodically as you gain new skills, complete training, or produce documents that will demonstrate your skills effectively.
Office workers must be able to manage work effectively to be productive. The lighting and the way materials and the work area are arranged affect your work. Most companies try to provide comfortable and safe work areas for their office employees. Employees should keep the work area well organized. They should also be aware of safety and security issues that affect workers in an office.

Workstation Management

Your workstation is a key part of your work environment. A workstation is the physical area in which a worker performs a job. A typical workstation provides a work surface and space for equipment and supplies.

Manage Your Workstation

Arrange your work area to give easy access to the items used frequently. A computer keyboard, telephone, supplies, and reference materials should be within easy reach. Many companies use modular workstations. These workstations are made up of parts that can be put together in various ways. Wall panels, storage areas, and a desktop surface are typical workstation parts. Note the workstation parts shown in Figure 7-2.1.
**Desktop Area**

Keep your workstation’s surface clear. Clutter on the desktop can cause unnecessary delays as you search for papers or objects. Remove materials that do not relate to your current project. Put descriptive labels on file folders, and place documents in the folders when they are not needed. Place the folders in your file drawer.

Arrange your equipment and supplies to allow easy access so that you avoid making unnecessary movements. Keep frequently used supplies, such as pencils and paper clips, in a caddy on the surface of your work area. Reaching for the caddy is more efficient than opening and closing a drawer each time you need an item.

**Drawers**

Reserve your center drawer for frequently used supplies, such as a letter opener, scissors, and paper clips, that are not needed on the surface area. Arrange the contents of the center drawer so that the most frequently used supplies are toward the front where you can reach them easily.

The top side drawer may be used to store stationery supplies or to lay file folders containing current work so that they are at hand when you need them. You avoid cluttering the desktop by putting the file folders in a specific location in your desk. In this way, you also can protect any confidential items.

A desk also may contain either a file drawer or additional side drawers. A file drawer can be used to store files that are referred to often but are not in current use. Other drawers can be used to store supplies.
Reference Materials

The nature of your job will determine which references you will use most often. Some items may be in print form. Others may be accessed via your computer. Reference materials that should be at your workstation may include a dictionary, telephone directories, company and office reference manuals, safety handbooks, and equipment and software manuals. Other reference items used less often may include an almanac, atlas, and vendor supply catalogues.

Supplies and Accessories

Office employees use a variety of supplies and accessories to do their jobs. The right resources help you perform your job more efficiently. What you need at your workstation will depend on your particular job. An adequately stocked workstation is essential to your productivity. If you run out of supplies in the middle of a critical task, you could lose valuable work time by stopping to gather needed supplies. Also, you run the risk of not completing the task on time. Use supplies properly for best results and to save money. Follow these guidelines:

- Select the quality of the supply according to the nature and importance of the task. For example, if you are preparing a rough draft of an important letter, don’t use expensive letterhead paper. Use a lower-quality paper for the rough draft and the letterhead paper for the final copy.
- Learn to read product labels for the correct use of a product. For example, paper designed for use in a laser printer may not work well in an inkjet printer.
- Look for ways to conserve supplies. For example, reuse file folders by placing new file folder labels over the old ones. To save paper, preview documents carefully onscreen before printing.
- Do not keep more supplies than you need in your workstation. Check your workstation periodically. If you have not used a supply item in several weeks, perhaps it should be returned to the supply cabinet.
Office Equipment

The condition of your equipment affects the quality of your work. You will want to keep your equipment in top working order. To get dependable service from your equipment, you will need to do preventive maintenance and give your equipment routine care. This involves servicing equipment and replacing parts while the equipment is working properly in order to prevent failure. Fewer repairs are necessary when equipment is cared for properly on a regular basis. By caring for equipment properly, you can extend the life of the equipment. Follow these maintenance guidelines:

- Learn how to use and care for the equipment properly. Read and understand the manufacturer’s operating instructions. Follow the care guidelines so that you are able to recognize and correct minor problems.
- Inspect and clean equipment regularly. Know the basic care routines your equipment requires. Make repairs as needed.
- Report problems right away to the appropriate person. Many minor problems can be corrected before they become serious and require costly repair.

Manage Ergonomic Factors

Ergonomics is the study of the effects of the work environment on the health of workers. The way a workstation and its parts are designed can affect your physical well being. Figure 7-2.2 on page 288 shows a workstation designed to be comfortable and reduce physical stress. This workstation allows the user to adjust the chair, desk, lighting, and computer equipment.
A well-designed chair is essential because many office workers spend much of their time sitting. A chair should be adjustable, like the one shown in Figure 7-2.3. Office workers should be able to adjust their chairs to fit individual physical requirements for comfort and good posture.

**Figure 7-2.3**
Some experts believe a chair is the most important part of a workstation.
The height of the desktop should allow your elbows to be parallel to the computer keyboard and floor as shown in Figure 7-2.2. This arrangement prevents unnecessary strain on the arms and wrists. Keep the desktop clear of materials not related to the current task.

Two kinds of lighting are often found in workstations: ambient and task. Ambient lighting is provided by overhead light fixtures for the entire work area. Although you may not be able to adjust the overhead lighting, you can adjust the arrangement of your workstation. Task lighting focuses on the immediate work area and should be adjustable for your specific needs. Adjust the task lighting to prevent glare on your computer monitor or the desktop. Eliminate dark or dimly lit areas where you may have to retrieve files or work away from your desktop.

Your computer monitor should be placed at eye level, as shown in Figure 7-2.2, to help reduce eyestrain and neck pain. Glare on the monitor often contributes to eyestrain. Common symptoms of eyestrain are teary or burning eyes, blurred vision, and headaches. Glare from outside light can be prevented by placing the computer monitor so that you do not face a window or have your back to a window. Peripheral input devices, such as the mouse, should be located next to the computer keyboard. The movement of the arm from the keyboard to the input device should be natural and without strain.

**Manage Your Office Health**

Be aware of the physical responses your body has to your work procedures and habits. Doing so will enhance your job satisfaction, comfort, and productivity. The following guidelines may help you complete your work without feelings of strain, fatigue, or other physical discomforts:

- Learn to adjust the workstation parts for the best fit to your work habits and procedures. Follow the manufacturer’s recommended work postures and practices even if at first they feel unnatural.
- Take rest breaks often—at least 15 minutes every two hours. Do not sit in front of your computer monitor or at your desk for long uninterrupted periods of time. Arrange your work so that you have to get out of your chair and walk to the copier or to the supply cabinet. If you feel yourself becoming bored, stop working and do simple breathing or relaxation exercises.
- Learn stretching exercises for your hands, wrists, arms, and fingers to relieve pressure on them. **Carpal tunnel syndrome** is a repetitive strain injury that occurs when stress is placed on the hands, wrists, or arms. It can occur while working at the computer keyboard or using the computer input device for long periods of time.
- Focus your eyes away from your computer monitor often. Remember to blink your eyes. If possible, face your computer monitor against a wall to avoid looking directly out of a window or into glare from other bright light sources. Place antiglare filters over the monitor screen. Filters reduce glare, static electricity, and dirt and smudge buildup on the screen.
FOCUS ON . . .

Workplace Wellness

Many Americans spend more hours at work than ever before. The office has become an important place for employees to understand health and wellness. Wellness includes issues such as nutrition and controlling stress. Balancing work and family life are also wellness issues.

Wellness in the workplace is now an important focus in business. Employers know that when these lifestyle factors are controlled, everyone benefits. This is why companies are consulting with wellness experts. Many companies have wellness programs that promote a healthy lifestyle. As a result, medical expenses and work time lost due to illness may decrease.

Eating healthy food, getting enough exercise, and managing one’s weight are important parts of wellness. Many Americans have busy work schedules. They find making time for exercise and cooking healthy meals hard. Employers can take steps to help employees stay healthy. Some of the steps include:

- Provide purified water or juice as an alternative to soft drinks.
- Post the calories and fat grams of foods served in the company dining room.
- Encourage employees to include physical exercise in the workday. For example, workers could use the stairs instead of the elevators. Workers might use an on-site gym for exercise before or after the workday.

Some companies provide incentives or rewards for workers who take part in wellness programs. For example, workers may earn points that can be redeemed for prizes. Other companies offer reduced rates for health insurance to employees who take part in wellness programs.

Wellness programs benefit both employers and employees. If your company has a wellness program, consider taking part in it. You can also develop your own personal plan for a healthy lifestyle. Articles related to wellness issues can be found on the Internet and in magazines and newspapers. This information can help you learn to eat properly, exercise, and manage work-related stress. For example, the U.S. government publishes Finding Your Way to a Healthier You.* This article contains guidelines for a healthy diet. You can access this article using the link provided on The Office Web site.


- Adjust the screen brightness to a contrast level that is comfortable for you. Adjust the screen angle so that it is at eye level or slightly lower. Adjust the screen display properties for comfortable viewing. Resolution and color quality settings for a system with two monitors are shown in Figure 7-2.4.

- Learn and use good posture. Keep your back straight against the back of your chair and your feet flat on the floor. Adjust your chair so that your feet do not dangle off the floor. Use a footrest if your feet don’t touch the floor. Use a back pad to keep your back in a straight line and adjust your computer monitor to the right height and angle for you.
Arrange your work materials so that you do not have to reach far to a telephone or supplies. Take care when lifting heavy binders or boxes or bending to reach files. Do not strain to use staplers or paper punches. Avoid repetitive motions for long periods of time without taking a break.

Report any prolonged physical discomfort that affects your work performance to your supervisor.

WORKPLACE CONNECTIONS

Marletta Diaz works long hours at her desk and computer. In the past, she often experienced sore wrists and eyestrain. After hearing a presentation about ergonomics at a workshop, Marletta realized she could take some simple steps to help prevent these problems. Now she takes breaks from the computer keyboard frequently to give her hands, wrists, and arms a chance to relax. She drops her arms to her side and dangles them to relieve tension. She also squeezes a handgripper to strengthen and relieve tension in hands and wrists. Marletta rearranged her workstation to reduce glare on the monitor from a nearby window. These small changes in Marletta’s routine and the arrangement of her workstation can make a big difference in long run.
Office Safety

Most of us think of the office as a safe place to work. Office workers are not required to use heavy equipment or power tools. They are seldom exposed to poisonous chemicals or dangerous working conditions. Yet, thousands of office workers have disabling accidents each year. Falling, tripping, or slipping account for many office accidents. Common causes of falls include drawers partially open, slippery floors, torn or loose carpeting, obstructions on stairs or in walkways, and dangling telephone or electrical cords.

Faulty or poorly maintained equipment can be a cause of accidents in the office. Falling objects and fire and electrical hazards can pose dangers. Human carelessness can also be a cause of accidents in the office. With knowledge of correct safety procedures, however, you can learn how to correct and report safety problems. Reporting problems will help prevent injury to you and your coworkers.

Accident Prevention

To many people, the office seems to hold little danger. Accidents may happen because workers do not see possible dangers. Becoming aware of safety hazards in an office is the first step to preventing accidents. Workers should develop positive safety attitudes. They should try to see potential safety problems and take steps to remove them.

Workstation Safety

Most office employees spend the majority of their working time at their workstations. Applying safety practices at your workstation will help prevent accidents and injuries.
Desktop Area
As you work, you will occasionally use scissors and other sharp objects. Place them away from the edge of your workstation so they will not be knocked off easily. Pencils stored on the top of your desk with the sharp points up are dangerous; they are best stored flat or with points down. Use a staple remover, rather than your fingernail, to remove staples. Never examine a jammed stapler by holding it near your eyes or testing it over your finger.

Drawers
Keep your workstation drawers neat. Do not allow papers to collect to the point of clutter. If the drawers are cluttered, your hands could easily be punctured by hidden scissors, pins, or pencils. Sharp objects such as pins and thumbtacks should be placed in closed containers.

Even with these precautions, never reach blindly into a desk drawer or file drawer. Take time to look where you are placing your hands, even if you are rushed or are talking to someone. Close workstation and file drawers by the handle. Do not push a drawer shut by placing your hand at the top or side of the drawer. You may lose a fingernail or suffer a crushed finger or hand.

Chairs/Mats/Static Control
Most office chairs have casters, which are small wheels that provide ease of movement for the worker. This same ease of movement can produce painful injury unless you look at the chair and hold onto its arms or seat as you sit down. When seated, be careful not to lean too far forward or backward to prevent falling out of the chair.

A chair mat is a vinyl pad placed underneath the chair to eliminate wear on the carpet from rolling the chair. Static control mats are designed for use on floors underneath workstations and computers. The static control mat safeguards valuable computer data and electronic equipment from possible harm from a charge of static electricity.

Chair mats and static control mats can cause you to trip, particularly if the edges are beginning to curl. Replace worn mats when they become a hazard.

Work Area Safety
In addition to your workstation, other objects in your immediate work area can add to your comfort and work productivity. They can also become a source of injury.

Office Furnishings
Learn how to use small furnishings, such as a step stool and paper cutter. In using a step stool with casters, step firmly in the middle of the stool. Never step to the side because this can cause the stool to slide out from under you. When using the paper cutter, keep your fingers away from the blade and never leave the blade up. Furniture with rough or sharp edges should be sanded or taped to prevent injury to employees and to prevent clothing from being torn. Report tears in carpets, burned-out lights, broken handles on equipment, and other potential hazards related to office furnishings to the appropriate person.
File drawers should be filled beginning with the bottom drawer of the cabinet and moving to the top drawer. They should be emptied from the top drawer down. When working with file cabinets, pull out only one drawer at a time. You do not want to change the cabinet’s center of gravity and cause it to tip over. Avoid placing objects that have the potential to harm you or your coworkers on top of filing cabinets. Coffeemakers or heavy plants can slip off the cabinet and cause serious injuries.

**Electrical Equipment**

Office workers use many pieces of equipment that require cords and cables. These cords and cables can become a safety hazard. Cables and cords should never extend into traffic areas. Do not overload electrical outlets. If necessary, purchase a power strip or **surge suppressor** made for use with multiple appliances. An extension cord should be used only to extend the position of the electrical appliance. It should not be used to increase the power load.

Component: surge suppressor. An electrical outlet that controls unexpected sharp increases in electricity.

Cords, cables, and power strips should be placed behind equipment or within the walls of the workstation. If cords must be placed where people walk, tape them down or cover them with materials made specifically for this purpose.
General Office Equipment

Office equipment can be dangerous if it is not operated properly. Keep the following safety procedures in mind when you use office equipment:

- Follow the manufacturer’s directions for safe and efficient equipment use.
- Avoid other activities that will distract you from the operation of the equipment.
- If you feel a tingling sensation, notice smoke, or smell something burning while you are operating the equipment, turn it off. Investigate the problem or report it to the appropriate person immediately.
- Know where the power switches are located on the equipment in your general area. In the event of an emergency or power outage, you may need to turn off the equipment.

Emergency Procedures

Emergency procedures are steps to follow in time of trouble or danger. A fire, storm, or robbery in progress are examples of emergencies you might face at work. Learn emergency procedures as soon as you begin a new job. If your office does not have established procedures, do what you can to help initiate practices such as those described in the following paragraphs.

Emergency Telephone Numbers

Telephone numbers to call in times of emergency should be posted beside each telephone. The most important ones are those of the company medical and security personnel. Numbers for the local police, fire department, and paramedics should be included in the list. If your area has a general emergency number, such as 911, include it also. Emergency numbers may also be stored in each telephone’s memory. The memory feature saves valuable time. You press only one or two buttons, and the number is automatically dialed.

First Aid Procedures

First aid kits should be located conveniently within the office. They should be inspected frequently and restocked whenever supplies are used from the kit. Some firms will send an employee from each floor or work group for first aid training and/or CPR (cardiopulmonary resuscitation) classes. These courses are given periodically by the American Red Cross and other organizations. Each employee should know who has completed first aid training and who is qualified to help in the critical first minutes of an emergency. First aid posters can be placed where they can easily be seen to further assist employees.
Fires

Some companies prohibit the use of appliances, such as cup warmers and space heaters, because of their potential fire hazard. If appliances are allowed in your office, always unplug them when they are not in use and before leaving the office. Know the location of the nearest fire exit, fire alarm box, and fire extinguisher. Large office buildings generally have the fire alarm boxes and fire extinguishers in the same location patterns on each floor. Learn how to use the fire extinguisher and what type of fire it is intended to put out. Never attempt to fight a fire alone. Always have someone report it to the proper agency.

Building Evacuation Plans

Learn the established escape routes and evacuation procedures for your building. Emergency exit routes should be posted in noticeable places throughout the building. Employees should know their duties during a drill or evacuation. Who, for example, is responsible for checking conference rooms, restrooms, and other areas where the alarm may not be heard?

WORKPLACE CONNECTIONS

Jacob, a new employee at Park Company, was impressed when he learned that the owners are very concerned about employee safety. Jacob learned that fire evacuation routes and routes to tornado shelters are posted on every floor. The company holds fire and tornado safety drills on a monthly basis. He was also impressed to learn that the company sponsors safety classes held by the local fire department. The classes cover the use of fire extinguishers, general fire safety, first aid, and CPR.

With this clear focus on safety, Jacob knows he will be able to do his work without worrying about his personal safety.
Personal Security on the Job

Protection for yourself and your property requires continuous attention on your part. Most businesses strive to provide a safe and secure work environment for their employees. To support the company’s effort in providing for your safety and security on the job, always use good common sense. A purse left at a workstation, a jacket slung over the back of a chair or left in an unoccupied office, cash left out in plain sight—all are invitations to a would-be thief. Keep personal belongings out of sight and locked in a drawer, file cabinet, employee locker, or closet. The key to this drawer or other container should be issued only to the employee who is assigned its use.

Sometimes you may find it necessary to stay late at the office or to come in early. Follow your company’s procedures for being in the building during non-working hours. If no after-hours procedures exist, create your own security routine and follow it. Follow these security procedures when you work alone:

- Always work near a phone and keep emergency telephone numbers handy.
- Lock all doors to your work area. Do not open the door to anyone you are not expecting or cannot identify.
- Get to know the cleaning staff and when to expect them.
- If you use the elevator to leave the building, do not enter the elevator if anyone is in it whom you find suspicious.
- Avoid using a restroom that is located away from your work area.
- When working late, phone home before leaving the office to let someone know what time to expect you. If you live alone, call a friend before leaving the office and again when you get home to let her or him know you’ve arrived safely.
- Park your car near the building entrance and/or in a lighted parking lot. Check the parking lot visually before leaving the building. Have your car keys in your hand and ready to use. If security personnel are available, ask to be escorted to your car.

Building and Office Security

Many businesses take a serious approach to fulfilling building and office security needs. Discontented workers, theft, sabotage, and fire are major security concerns of a business.

Many companies have security procedures to guard against actions by employees who have been fired or who are under pressures from work. Sometimes upset workers can pose a hazard to themselves and to other workers. Be alert to changes in your coworkers’ behavior. Notice statements they may make that sound like threats against employees or the company. Know the procedures for protecting yourself from these workers:

- Do not get involved in a verbal argument.
- Leave the work area if you feel threatened and go to a safe area.
- Report any unusual behavior to your supervisor and/or company security personnel.
The protection of data is an issue in many companies. Entrance to secure areas where data are kept or can be accessed is carefully controlled. Employees may need access codes or passwords to enter these areas.

**Controlling Outsider Access**

Many companies must be open to the public to do business. However, the public does not need access to all parts of most office buildings. Businesses use varied security means to protect employees and assets.

Some companies have security personnel who make sure each visitor signs a log. The log shows the visitor’s name, address, and the name of the person or office being visited. Some companies send an employee to the lobby to escort a visitor back to the office. In smaller offices, the receptionist may be present in the front office and may screen visitors.

**Controlling Employee Access**

At some companies, employees must wear identification (ID) badges. These badges are used to gain entrance to parts of the building. The badge may contain the employee’s photo or a fingerprint. The badge may have a magnetic code. The code may be read by a card reader to allow entrance to a room or use of equipment.

Some badge codes can be read by proximity readers. The reader automatically identifies the badge when the wearer is in a restricted area. The reader sends data to a computer. This data provides a record of who enters and leaves designated areas, the time of entry, and in some instances, the time of exit—all valuable security information.

Your cooperation in wearing your ID helps assure your personal safety and security on the job. A lost or stolen ID should be reported right away to the appropriate person.
Some companies issue photo IDs or magnetically coded access cards to their employees.

Olivia looked up to see a repairman coming through the doorway. “Hi, I’m Tim. I’m here to check your computer. Apparently, you had a large electrical surge last night. Here’s the order,” he said, as he flashed a copy of a repair order in front of Olivia. “This will take a few minutes—why don’t you just take a short break?”

Olivia got up from her terminal, but she was puzzled. She hadn’t heard that an electrical surge had occurred. “Besides,” she thought, “we have surge suppressors for the equipment.” Olivia felt she should check this with her supervisor, Ms. Calibre.

Ms. Calibre was not aware of an electrical surge occurring either. “Let me check on this before we do anything,” she said. Olivia stepped back into her office to see the repairman disconnecting the computer.

Repairman: “Looks like I’ll have to take your computer back to the shop for repairs.”

Olivia: “You’ll have to wait until my supervisor authorizes you to take the computer.”

Repairman: “Well, I have several other computers to check. Why don’t I come back after I’ve checked them and pick this one up.”

The repairman left hurriedly, and a minute or so later Olivia’s supervisor appeared at the door: “No one authorized a computer repair check. We had better report this.”

Ms. Calibre called the police immediately to report the incident. She spoke to Sergeant Roberts. He told her that several businesses had recently lost computers and other equipment in this manner. “You’re lucky to have an alert employee,” the sergeant told Ms. Calibre. “None of the others questioned an unexpected repair check. When the employees returned from their ‘short breaks,’ their equipment was gone.”
Detection Systems and Alarms

A detection system consists of devices and alarms that sense and signal a change in the condition of an area. Some systems detect entry into an area while others detect movement in an area. An alarm sounds or is displayed on a computer screen when an intruder is detected. Such systems reduce a company’s reliance on an on-site security guard. Even if a firm has security officers, they cannot be at all stations at once.

Closed-circuit television can be used to monitor corridors, entrances, or other areas. When used with a videotape recorder, closed-circuit television provides the firm with a record of events for later review.
REVIEWING THE TOPIC

1. What is the guiding principle you should follow in planning the arrangement of a workstation?

2. Describe how you can organize your workstation (both desktop areas and drawers) to increase your productivity.

3. Discuss the guidelines an office worker should follow when using office equipment, supplies, and accessories.

4. Why are routine maintenance and care of office equipment important?

5. What are the safety practices you should follow in maintaining your own workstation?

6. What are the safety practices you should follow with regard to office furnishings and equipment?

7. Describe the emergency office procedures you should learn immediately upon starting a new job.

8. Describe some of the precautions you may take as an office worker to protect yourself and your personal property on the job.

9. How can you help assure your personal security when you are working alone?

10. What are some procedures businesses use to control access to their property and employees by other employees and by outsiders?

THINKING CRITICALLY

At a department meeting your manager, Mr. Joe Petersen, discusses a memo regarding company security. He shakes his head and says: “This is the second memo the managers have received about security leaks. One of our competitors has just introduced a new product, and it’s identical to a product we have been working on. Apparently they discovered our plans. The president wants our thoughts on how to improve our product security. In addition to the main shredder in the copy center, he is suggesting a shredder for each office. Well, I’m just glad everyone in our department can be trusted.”

As you hear this, you remember several situations you have observed in the office:

• You have seen poor photocopies—even photocopies of confidential material—discarded in the wastebasket.

• Computer printouts with product-testing results are left stacked next to the filing cabinets rather than being locked inside them.

• Workers often talk about current projects during their breaks.

• Workers have a habit of using the offices of other workers who are out of town or on vacation.
Workers too freely give out unnecessary information to callers, such as telling a caller exactly where the individual is.

“Tell me,” Mr. Petersen says, “do you think we need a shredder? What other measures can we take to tighten security? Please give this matter some thought and send me your ideas.” How do you respond to him? What suggestions can you make for tightening office security?

1. Prepare a response to the questions Mr. Petersen asks in the form of an e-mail message. Send the message to your instructor’s e-mail address (or save and print the message). Prepare a memo to Mr. Joe Petersen instead if you do not have access to e-mail.

2. In the message, include suggestions for correcting the problems discussed as well as other security measures that you think would be effective.

REINFORCING ENGLISH SKILLS

In this exercise, you will practice your writing and editing skills by preparing a letter from a rough draft.

1. Open and print the PDF file CH07 Letter from the data files. This file contains the rough draft letter.

2. Key the letter. Correct all grammatical, spelling, number/word usage, capitalization, and punctuation errors in the letter. Insert paragraphs and reword the letter to correct errors where appropriate. Evaluate the letter with the five Cs of effective communication in mind.

3. Assume the letter will be printed on letterhead paper. Arrange the letter in an acceptable format and add any missing letter parts. Use your name in the signature block. Print one copy and sign the letter.

Topic 7-2

ACTIVITY 1

Needs Assessment for Equipment

You work for Wayne Electronics. Your manager has received requests from several employees. They ask that the company purchase one or more multimedia projectors. Currently, employees rent a projector when it is needed.

You have been asked to do a needs assessment. Your goal is to determine whether renting or buying a projector is more cost effective for the company. A needs assessment involves gathering data about the proposed need.
The data are then analyzed. The final step is to make a recommendation or decision about how to proceed.

1. Complete the data-gathering phase of the needs assessment. Prepare a memo form for Wayne Electronics using the appropriate headings. Compose a memo addressed to Department Heads from you. Use the current date and an appropriate subject line. Ask specific questions about projector use such as:
   • How often is a projector used in your department?
   • What is the purpose of the presentations?
   • How many people attend the presentations?
   • What is the length of time the projector is rented for each presentation?

   Include any other questions you think are relevant. Ask the managers to include any other pertinent information they may have in their replies.

2. Analyze the information received from the other departments. Open and print the Word file CH07 Projector from the data files. This file contains replies from five departments. Use spreadsheet software to record and summarize the information in the replies. Find the estimated total spent by all departments for renting projectors for a year.

3. Analyze the use patterns for the projectors. Are they used regularly throughout the year or do several department members need a projector at the same time? Are different departments likely to need a projector at the same time?

4. Consider the sizes of the audiences for the various presentations. Will one projector be appropriate for most of the presentations? What is the maximum audience size the projector should be appropriate for?

5. Review the types of projectors available for purchase and their features by accessing office equipment Web sites or office equipment catalogs. Determine the type of projector that would be appropriate for most presentations given by employees. What is the cost of this projector and a spare bulb? How does this cost compare to the estimated annual rental cost for projectors?

6. Write a memo to your supervisor, Shawn Valdez, giving your recommendation for buying or continuing to rent projectors. Discuss how your data were collected. Summarize the information that led to your recommendation.
You work in the Marketing Department of Robert’s Distributors. One of your duties is to make sure that all preventive maintenance is done on the office equipment in your department. Preventive maintenance is usually done by a qualified repair technician to prevent equipment breakdowns and prolong the life of the equipment.

### Preventive Maintenance Schedule

<table>
<thead>
<tr>
<th>Equipment</th>
<th>Month Purchased</th>
<th>Maintenance Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copier, high volume</td>
<td>February</td>
<td>Every 3 months</td>
</tr>
<tr>
<td>Copier, small convenience</td>
<td>January</td>
<td>Every 6 months</td>
</tr>
<tr>
<td>Fax machine with laser printer</td>
<td>October</td>
<td>Every 4 months</td>
</tr>
<tr>
<td>Laser printer, desktop</td>
<td>April</td>
<td>Every 12 months</td>
</tr>
<tr>
<td>Laser printer, high volume</td>
<td>October</td>
<td>Every 6 months</td>
</tr>
</tbody>
</table>

1. Each piece of equipment was purchased last year in the month shown in the preventive maintenance schedule. Based on the schedule, which equipment will need preventive maintenance in April?

2. Will any pieces of equipment need preventive maintenance in May? If yes, which ones?

3. Assume January is the current month and the fax machine has not been serviced. How many times will the fax machine need preventive maintenance during the remainder of this year?

4. Assume March is the current month. In what month will the small convenience copier be scheduled for its next maintenance?

5. You are also responsible for routine care of all of the equipment. Because you are getting ready to leave on a two-week vacation, your supervisor has asked you to develop a set of procedures for routine care that your coworkers can follow in your absence. Open and print the PDF file CH07 Care from the data files. This file contains notes you have been jotting down this week about equipment care.

6. Using your notes, key a schedule for routine equipment care activities for each piece of equipment. Your notes are in rough form and incomplete sentences. Edit, correct errors, and compose as needed to create procedures that are well-written and easy to understand.
Summary

In this chapter, you learned the importance of managing your time and workstation effectively. Office safety and security procedures also were discussed. Consider the points listed below as you reinforce your understanding of the topics in this chapter:

- Task management is vital to your success on the job. Although what you actually do in your job will depend on the nature of your company, you will need to plan and organize your work activities, whatever they may be.
- You will need to manage effectively the resources that support your work activities. The basic resources for this are your workstation and your time. Your workstation provides the physical space for you to do your job. By correctly organizing the equipment and supplies at your workstation, you can increase your productivity.
- Your time at work must be used to assure that your job duties are handled effectively and that time-wasters are eliminated.
- Office workers use a variety of office supplies and equipment. Correctly selecting, using, and caring for office supplies help reduce costs. Office workers are expected to learn how to use office equipment properly. They must also do their part in properly maintaining it.
- Ergonomic factors related to the office affect your comfort and well-being. They can also help improve your productivity.
- Many organizations strive to maintain a safe and secure environment for their employees. As an office worker, you should follow safe practices at your workstation. You should understand and follow all security measures established by your company.

Key Terms

carpal tunnel syndrome  evacuation  procrastinate
chronologically  flexible  project management
 detection system  modular workstation  program
 emergency  personal digital assistant (PDA)  surge suppressor
 procedures  preventive maintenance  time management
 ergonomics  workstation  work simplification
Prioritize and Schedule Tasks

Your manager, Mr. Wong, has asked you to plan and submit a schedule for advertising a sale of office equipment. The sale will begin two months from today. He hands you a rough draft of the inventory list of the products that will be included in the sale. Items marked with an asterisk (*) will have to be ordered from the suppliers so that they arrive in time for the sale.

1. Create a task list for the sale. Open and print the PDF file CH07 Tasks from the data files. This file contains a partial list.

2. Create a form that includes these columns: Priority, Task, and Completed. Place the items on the form in the Task column. Next, prioritize the items by ranking them in order of importance:
   A Most Important
   B Medium Importance
   C Least Important item

3. Key the rank in the Priority column. If an item is listed as a C item, does it need to be completed at all? If not, delete the item. Are there other items that need to be added to this list? If yes, add these items.

4. Create a schedule for preparing for the office equipment sale. Use spreadsheet software to create the schedule.
   • List tasks to be completed from your task list in order by date using the dates when a task should be begun. Start with your ending deadline and work backward to create your schedule. For example, if a task should be completed one week before the sale and the task takes two weeks to complete, then list the task on the date three weeks prior to the sale.
   • Show dates when each task should be completed.
   • Include a column to check off tasks and confirm that they have been completed on time.
1. Use your textbook, magazine articles, Web sites, or other resources to research safety as it relates to an office environment. Compose a list of 10 to 15 office safety guidelines. Arrange the items on the safety guidelines list in order of importance, with Item 1 being the most important and Item 15 being the least important. Key your guidelines in an attractive format that can be posted or distributed to office employees.

2. Plan the content and create visuals for a short presentation on office safety. Your committee may choose to include all 15 items in the safety presentation or choose to focus on the 5 most important items according to your list. Your presentation should include the major points about safety as well as art, tables, graphs, or other elements to support and enhance the presentation.

3. Decide what content each person will present and practice your presentation.

4. Deliver the presentation to another work group or to the entire class.